Department of Education
Office of Student Financial Assistance

Deliverable 31.2.14 Evaluation Report

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1. Executive Summary

Student Aid Front 2 Back is the third in a series of core curriculum courses offered by SFA University. The purpose of the course is to help SFA employees and Operating Partners gain a better understanding of the process a student goes through when applying for financial aid, the other "players" in the financial aid industry (Schools, Lenders, Guarantors) and how they interact with one another in support of the student. Additionally, SFA employees and Operating Partners will learn more about the measurements that are being used by SFA to evaluate and improve SFA's support of the student financial aid process.

A critical element of any successful training program is collecting feedback to benefit future courses. This involves gathering both the successes achieved and areas for improvement. At the end of each Front 2 Back session, participants completed an evaluation of the course and its components.

This document reports on trends and overall findings in Student Aid Front 2 Back course evaluations. It also includes a summary of the implications or recommendations for future training programs, based on these evaluations. Elements evaluated by course participants are reviewed by category, accompanied by corresponding participant commentary. Appendices include a sample course evaluation and examples of those received.

2. Overview of evaluation process

To fully evaluate a training program's benefits, the views of its participants are central. At the conclusion of each Student Aid Front 2 Back session, attendees completed an evaluation through which they recorded their observations on the course's content, facilitation, logistics, and other factors. Through these individual appraisals, the program's strengths or weaknesses may be gleaned.

The Front 2 Back participant evaluation consisted of twelve course-related questions. Additionally, participants were asked to indicate their knowledge of the financial aid process prior to attending the course. This self-assessment provides a basis for scores that follow, establishing one's prior experience with the content discussed during the course of the day.

Participant feedback was recorded in two forms: statistical (or numerical) and free-form writing. For ten of the twelve questions, attendees marked their reactions to certain course elements on a scale of one to five. Generally, a rating of "one" indicated that the curriculum was not effective in explaining that portion of the course. Conversely, a rating of "five" indicated that the curriculum was effective in explaining that portion of the course. A five-point scale, such as this one, allows for an "average" rating, then

gradations of effectiveness on either side. Questions that addressed facilitation and logistics employed a similar five-point scale. Mirroring the previous questions, a rating of "one" remained a low ranking, while a "five" indicated the highest measure. Specifically, these ranges inquired about how well facilitators encouraged participation, how clearly facilitators communicated, and how well logistics coordinators supported the program. Finally, two questions addressed participants' general comments and requests for future course offerings. Due to the nature of these questions, only free-form answers were solicited.

3. General evaluation findings

While participant evaluations may indicate strengths and weaknesses of a training program, they are, by their nature, subjective. To fully understand evaluation results, one must consider many elements. These include the response rate to certain questions (particularly in relation to the total number of evaluations), the average numerical rating for each question, typical written responses, and the trends these imply.

Broadly, the Front 2 Back evaluations reveal trends in existing knowledge among employees, reception of course content and activities, and the development of working relationships with operating partners. Given the number of participants, exceeding 1200 individuals, it is noteworthy that a wide range of talents, skills, and backgrounds were present in each session. That said, some themes emerge from which elementary generalizations may be drawn.

In response to the question inquiring how well participants understood the financial aid process prior to the course, the average rating was 3.91 on the 5-point scale. This indicates a generally high self-assessment of knowledge in this area. The reception of content and activities, both positive and negative, could be viewed through that perspective. While one objective of the course was to establish a common vision of SFA's involvement in the financial aid process, many individuals felt their existing knowledge exceeded the basic content of the course. Others, meanwhile, viewed the approach to training as new and refreshing, offering an updated face to such programs. The involvement of operating partners in the training, both as presenters and participants, received positive ratings.

4. Specific feedback

The Front 2 Back course evaluation was designed to gather feedback in a number of areas of the course, including: content, logistics, facilitation, general comments, and requests for future SFA U. course offerings. Within this section of the evaluation report, participant comments are reviewed for trends, similarities and differences between

regions and headquarters, and examples of specific comments. The quotes used as examples represent a sample of the total responses and are intended to illustrate the respondents' different perspectives.

<u>Content</u>

Content

The first section of the evaluation, questions one through seven, focused directly on the content of the Front 2 Back course. Each question followed the heading, **"How effective was this course in explaining…"** which acted as a mechanism to elicit illustrative answers. Listed below are the specific questions asked:

How effective was the course in explaining:

Question 1: *The basic steps in the financial aid process as a student applies for, receives, and repays financial aid?*

Question 2: *The basic roles of schools, SFA, lenders, guarantors, and operating partners in the financial aid process?*

Question 3: *The fundamental differences between various student aid programs (ex: Direct Loans, FFEL, Campus-Based and Grants)?*

Question 4: *SFA's 3 scorecard measures, measurement tools, and performance goals?*

Question 5: *The purpose of modernization and transformation?*

Question 6: *How effective was this course in explaining how the SFA organization supports the financial aid process?*

Question 7: *The course activities and discussions were (range from not engaging to very engaging)?*

Statistics

The average score for each of the content-related questions is listed below. In addition, a total average of all content-related questions is also listed.

Question 1:	*4.52*
Question 2:	*4.30*
Question 3:	*4.18*
Question 4:	*4.18*
Question 5:	*4.21*
Question 6:	*4.42*
Question 7:	*4.44*
Total average:	*4.32*

Comments

In regards to content, both headquarters and regional participants provided similar feedback: the course attempted to cover too much material, too quickly, and without enough depth. A noticeable difference was detectable, however, between how the regions and headquarters interpreted the basic level of detail covered in the course.

The headquarters attendees appeared more satisfied by a training program targeted at establishing a baseline level of knowledge throughout the entire organization. Generally, they expressed a desire to have more detail in the future, while also indicating that this class provided a solid or basic level of understanding for those who attended.

In contrast, regional participants generally reported that they already possessed this targeted "common" level of knowledge. Comments from this group tended to focus on the elementary nature of the subject matter and questioned the need for such a basic course.

Sample responses to content-related questions included the following:

- "I realize that this process is much more detailed, but I really feel this class gave me a solid basic understanding."
- "This was a good basic summary. Purpose is clear, but might need more detail on transformation."
- "I already know all of this for questions 1-3. Only useful info was list of operating partners in this manual. What a complete waste of time for Case Management staff. There may be people in SFA who need this basic financial aid info, but not case and direct loan staff. Why am I here? A great way to reduce unit cost would be to cancel this meaningless training."
- "This part was covered rather hurriedly."
- "A bit child-like, elementary."
- "Too brief."
- "It was too basic for the knowledge of what was done out here in the regions."

Logistics and Facilitation

Logistics and Facilitation

The second group of questions, numbers eight through ten, asked the participants to rate the performance of both the logistics coordinators and the facilitators for each session. This feedback can be used to assess the performance of these two groups and the effectiveness of recruitment practices used to fill these positions. Specifically, participants were asked:

Question 8: *Overall, the facilitation team (range from did not encourage participation to consistently encouraged participation; range from did not communicate clearly to consistently communicated clearly)?*

Question 9: *Overall, the facilitation skills were (range from weak to strong)?*

Question 10: *Overall, the logistics coordinator (range from did not effectively support this program to very effectively supported this program)?*

Statistics

The average score for each of the logistics and facilitation related questions is listed below. In addition, a total average for all logistics and facilitation questions is also listed.

Question 8 (encourage):	*4.74*
Question 8 (communicate):	*4.68*
Question 9:	*4.63*
Question 10:	*4.71*
Total average:	*4.69*

Comments

As with the answers to the first set of questions, similarities and differences can be seen between headquarters and regional sessions. Comments regarding facilitators were consistently positive from both groups. One isolated case indicated some concern regarding the selection methodology. Comments pertaining to the logistics coordinator position revealed different perspectives in the regional locations when compared to those from headquarters. Responses from headquarters reflected an appreciation for, and understanding of, the logistics coordinator role. In contrast, regional comments reflected confusion over the logistics coordinator position. On some regional evaluations, questions exist regarding the role that these team members played in the overall success of Student Aid Front 2 Back.

Sample responses to facilitator-related questions included the following:

- "Did a nice job here! Constant participation."
- "Good pace, humor, knowledge."
- "The team did a super job!"
- "Bad – The RTF is better."

Sample responses to the logistics coordinator-related question included the following:

- "The LC was very supportive and an outstanding contributor to the effect."
- "Was there a need?"
- "Have no idea why they were here!"

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<u>General Comments</u>

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General Comments

Most remarks came in response to an open request for comments. The evaluation asked participants to provide general feedback about the course, beyond the topics addressed in the other evaluation questions. Specifically, they were asked:

***Question 11:** Any other comments?*

In general, the answers to this question were homogenous for all of the sessions, regardless of location. The response rate for this question was noticeably higher than for other questions in the survey. Individuals also tended to use this space to expand upon comments written earlier in the evaluation. The following categories of comments are presented by theme.

General

Overall, the reaction to this course was positive. The majority of responses to this question expressed satisfaction with the training experience, as well as a desire to say "thank you" to SFA U. for providing the course.

Samples of general comments included the following:

- "Good Job!"
- "This course is on point and from the reaction of the group, was a needed element of training."
- "I really enjoyed the training. I learned new things about SFA that I did not know before. This has been the best training."
- "Very informative session. I learned a lot about areas that were very unknown to me prior to this workshop."
- "Excellent overall review for new employees and partners. Extends knowledge of programs other than areas of assignment."
- "This was a good effort to level the playing field so that those not so involved in the aid application process could learn more. I applaud the efforts of SFA to bring together SFA employees and broaden their knowledge of school/student processes."
- "Excellent time well spent."

Level of Content

However, an underlying theme to a significant number of responses was that this course was too basic for the average SFA employee. When compared to answers from content-related questions, regional respondents noted positive benefits of the course, despite reporting that it was elementary.

Samples of comments regarding level of content included the following:

- "This was geared to the lowest common denominator. Very helpful to new people, tough on old people."
- "Way too elementary. Need to have different levels if you expect everyone to attend and to feel that time was well spent."
- "Very nice presentation, but a little long for one day. Splitting it up may cost more but would definitely make a more effective course."
- "I could've read everything presented if given a question, and learned it in under 2 hours. Courses take too long to make points. Ought to be half-day course."
- "Very demeaning to knowledgeable employees. Obviously SFA University did not consider the audience when developing the content. Too much rehash. Activities were not appropriate learning activities."
- "Basic for regional staff. Presenters were very good."
- "For this audience the material was too basic. The instructors did very well to keep people entertained and interested in spite of it all."
- "Appendix C is a good reference. For any employee who has been around a few years, there was very little that was new in this training."
- "Long day, could have been done in less time."

Specific Content

Another content-related theme involved the course material itself. Respondents noted how their area of SFA was covered during the class. Several comments mentioned the lack of depth with which their area was covered in the course, and this elicited strong responses.

Samples of comments regarding specific content included the following:

- "Include LEAP/SLEAP in documentation."
- "Financial Partner activities under-represented and in places, in the trainer's manual, incorrect."

Orientation

A recurring suggestion was to convert this course into an orientation session for new SFA employees. Although many deemed the content more basic than they needed personally, they viewed the content as a valuable foundation for employees to learn.

Samples of comments regarding orientation included the following:

- "I recommend this class be considered for some type of orientation for all employees who are new."
- "Should have this for every new employee in SFA."
- "The intent of the program was met. The course is a great orientation for new employees. However, it is very fundamental for senior level/experienced staff. I suggest for future courses that the "message" be better targeted to the audience vs. one-size fits all training."

Facilitation

While comments regarding facilitator performance tended to differ based on location, the comments were supportive of the entire team of facilitators. Specifically, the side-by-side facilitation and participation by SFA and Operating Partners was celebrated as one of the most enjoyable aspects of the course.

Samples of comments regarding facilitation included the following:

- "Speakers have great presentation skills."
- "Facilitators were strong leads in light of a mixed audience with some obviously disengaged/ poorly behaved participants."
- "The facilitators did a great job in a situation where some participants showed a good deal of resistance to modernization and operating partners."
- "Very valuable info. Lots of interest in more modernization info. Loved being trained with operating partners."
- "It was great being in this interactive session with SFA and operating partners. It helped me understand what others do and their perspectives. Will help us work effectively together. Really enjoyed course. Very beneficial."
- "Excellent course, very engaging, motivating, and helps partners and SFA personnel get to know each other."
- "Trainers were excellent."

Working Lunch

The concept of a working lunch was not popular with respondents for several reasons. Some individuals said they weren't informed of this requirement at the time of enrollment, some found it difficult to complete the activity while eating, and others simply felt they should be given a break for lunch. Regardless of the motivating factor, opposition to a "working lunch" was a noticeable theme throughout the comments.

Samples of comments regarding working lunch included the following:

- "Notify class participants of mandatory working lunch."
- "Didn't like lunch activity while eating."
- "Stop the working lunch!"

Mandatory Attendance

Finally, a significant number of comments referred to the course being "mandatory." The general sentiment was that while the content itself was worthwhile, it was too basic to warrant the mandatory attendance of employees with more than a year or two of experience.

A sample of comments regarding mandatory attendance included the following:

- "Useless, simplistic, a waste of public money, offensive as a function of being mandatory!"

<u>Future Course Offerings</u>

Future Course Offerings

Participants were also asked to submit suggestions for future course offerings. Specifically, they were asked:

Question 12: *What topics that were covered in this course would you like to learn more about? What topics would you like to see SFA U. offer courses on in the future?*

Generally, the responses to this question can be separated into three categories: Front 2 Back type courses focused on individual programs, players, and channels; professional development; and PBO results and next steps.

Specific Programs, Players, and Channels

These comments indicated that a significant number of SFA employees appreciated the general concept behind Student Aid Front 2 Back. However, they would recommend a narrower subject matter in future training programs. Respondents requested "Front 2 Back" type courses that focus on individual programs, players, or channels.

Topics mentioned specifically included:

- Case Management, Oversight, CFO, CIO, Pell, Campus-Based, Perkins Loans, Direct Loan, Lenders, Schools, Debt Collection Services, Loan Consolidation, Guarantee Agencies, Default, Individual Operating Partners, Financial Partners, State Agencies, and NSLDS.

Professional Development

Professional development is another area that respondents would like to see SFA U. address in future training offerings.

Specific topics mentioned included:

- How to climb the government corporate ladder
- How to network in SFA
- Basic Computer Training
- Professional Writing
- Project Management
- Public Speaking
- Teamwork and Teambuilding

PBO Results and Next Steps

The final category of courses requested is PBO results and next steps. Respondents requested courses on next steps and how those next steps may affect staffing at SFA.

Specific examples included:

- Performance measurements, goals, and scorecards (and effect of these on employment status)
- PBO: results and next steps (including failures as well as successes)
- Systems: Those being retired and their replacements
- Career Zone
- Results: How becoming a PBO is actually helping SFA become a more productive organization

5. Recommendations

The results of the Front 2 Back participant evaluations prompt a few recommendations for the design and delivery of future training programs. While specific ratings and comments reflect an individual's assessment of course elements, the themes they indicate present suggestions for the future. In effect, these serve as "lessons learned" from the participant perspective.

Based on the evaluation findings, some basic recommendations include:

- Generally, participants requested training offerings that are shorter, with more specific content.
- Similarly, courses should be more content-rich, in-depth, and substantive.
- While many were grateful for the working lunch, a significant number questioned its benefits. In future programs, the value of the working lunch should be closely considered and carefully scrutinized.
- The learning needs of regional and headquarters staff may differ. Though there's a desire to promote shared experiences between these groups, there is also interest in courses that address the specific job requirements of each of these groups.
- The involvement of operating partners in the design, development, and delivery of this course was commended. Such comments support the notion that collaboration of this kind strengthens these working relationships and encourages future partnership of this kind.
- Though not as integral as course content, participants clearly appreciate simple "extras" such as beverage service (specifically coffee), toys, music, and a positive learning environment.
- In terms of presentation, activities motivate many participants to remain involved in the class.

Overall, the class received balanced reviews. The evaluations offer many suggestions, recommendations, and insights for future training programs.

<u>Appendices</u>

Appendix A:

Evaluation Form

<u>Appendix B:</u>

Sample Evaluations